Reports Overview Quick Reference Card

Name of report	Reports sub module	Purpose of Report	Suggested frequency of generating report	Roles with permissions to generate report
Contract Agency Details (Program Management Report)	Agency & Program Plan	This report summarizes information regarding all contract agencies and their active, old and new contract.	• Annually • End of contract	• All core roles **except** Data Transfer and QA have access
Program Plan and Budget Information **(Program Management Report)**	Agency & Program Plan	This report summarizes annual program planning and program budget information for each agency for a specific fiscal year. It can be used for comparisons between multiple program plans, assessment of budget allocation or future program and budget allocation planning	• Annually	• All core roles **except** Data Transfer and QA have access
Report on Agencies that Deliver Services **(Monitoring and Evaluation Report)**	Agency & Program Plan	This report provides a detailed information of the budget and program information for the agency and contract agencies.	• Once a quarter • End of contract • As needed	• All core roles **excep**t Data Transfer and QA have access
Intervention Details and Client Characteristics (Planned vs. Delivered) Report **(Monitoring and Evaluation Report)**	Agency & Program Plan	This report allows an agency to compare the planning of client level interventions to the delivery. It can also help an agency determine if they are reaching the populations they intended.	• Quarterly • At the end of a cycle	• All core roles **except** Data Transfer and QA have access
Client Information Report (PCRS) **(Program Management Report)**	PCRS	This report provides information about a specific client working with an agency for PCRS. The report includes the case number, intervention name, locating information and demographics.	• As needed	• Client Level Services core role • PCRS core role
Partner Information Report (PCRS)	PCRS	This report provides information about a specific partner identified by a client through PCRS.	• As needed	• Client Level Services core role • PCRS core role

Reports Overview Quick Reference Card

Name of report	Reports sub module	Purpose of Report	Suggested frequency of generating report	Roles with permissions to generate report
(Program Management Report) continued	PCRS	intervention name, partner locating information and plan for notification of exposure		
Case Status Report **(Program Management Report)**	PCRS	This report provides a summary of information related to a PCRS Case. The report provides details on the agency, client information, partner information, attempts to locate, notification of exposure and referral information for each partner associated with a PCRS case.	• As needed	• Client Level Services core role • PCRS core role
HIV PCRS Activity Report **(Monitoring and Evaluation Report)**	PCRS	This report provides a summary of the total number of PCRS index clients and total number of elicited partners. This report can help answer how many clients have accepted enrollment into PCRS and how many partners have been located and notified of exposure.	• Quarterly • As needed	• Client Level Services core role • PCRS core role
Referral Label Report **(Program Management Report)**	Referral & recruitment	This report contains labels with PEMS uniquely generated referral codes, agency and case information. Each referral code is unique and facilitates the tracking and verification of referrals.	• Once a month to create a stack of referral codes that can be used to track referrals • As needed	• Client Level Services core role • PCRS core role • CTR core role • CRCS core role • Client HERR core role • Aggregate Level Services core role • Aggregate HCPI core role • Aggregate HERR/OR core role
Referrals Made Report **(Monitoring and Evaluation Report)**	Referral & recruitment	This report provides a summary of each referral made by an agency, grouped by referral outcome. This report will help an agency determine which referrals are in need of follow	• Monthly • As needed	• Client Level Services core role • PCRS core role • CTR core role • CRCS core role •

Reports Overview Quick Reference Card

Name of report	Reports sub module	Purpose of Report	Suggested frequency of generating report	Roles with permissions to generate report
Referrals Made Report (continued) **(Monitoring and Evaluation Report)**	Referral & recruitment	up and how many clients have access their referrals.		• Client HERR core role • Aggregate Level Services core role • Aggregate HCPI core role • Aggregate HERR/OR core role
Report of Incomplete Variables Reported to CDC **(QA Report)**	Quality Assurance	This report provides a summary of the incomplete or missing variables that are identified as "Reported to CDC – YES." This report can help agencies monitor data completeness for required variables before reporting to the CDC.	• Weekly or Biweekly	• QA core role
Incomplete Intervention Sessions **(QA Report)**	Quality Assurance	This report provides a summary of the intervention sessions with a data entry status of "incomplete" for an agency. This report can help agencies monitor data entry completeness for sessions.	• Weekly or Biweekly	• QA core role
HIV Testing Report **(Monitoring and Evaluation Report)**	CTR	This report provides a summary of all HIV tests and results administered by agency.	• Quarterly • As needed	• Client Level Services core role • CTR core role
Overview of Confidential HIV Testing **(Monitoring and Evaluation Report)**	CTR	This report provides a summary of all confidential HIV Tests and results administered by agency.	• Quarterly • As needed	• Client Level Services core role • CTR core role

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Name of report	Reports sub module	Purpose of Report	Suggested frequency of generating report	Roles with permissions to generate report
Summary report on Aggregate Service Delivery **(Monitoring and Evaluation Report)**	Aggregate Level Services	This report provides a summary of Aggregate services delivered through Outreach, HERR and HCPI interventions delivered by an agency. This report will help answer the agency determine if they are reaching their target populations.	• Once a cycle • Quarterly • As needed	• Aggregate Level Services core role • Aggregate HCPI core role • Aggregate HERR/OR core role
Overview of client characteristics by Agency **(Monitoring and Evaluation Report)**	Other Client Level Services	This report allows agencies to view the client characteristics reached through various client level interventions. This report includes high level data and detailed drill down information.	• Quarterly • Once a cycle per intervention • Throughout intervention cycle	• Client Level Services core role • PCRS core role • CTR core role • CRCS core role • Client HERR core role
Overview of client risk behaviors by agency **(Monitoring and Evaluation Report)**	Other Client Level Services	This report provides a high level summary of the demographic and risk information of clients reached through various client level interventions.	• Once an intervention cycle • Quarterly • As needed	• Client Level Services core role • PCRS core role • CTR core role • CRCS core role • Client HERR core role
HIV PCRS Cases by Worker and Case status **(Monitoring and Evaluation Report)**	Workers	This report provides a summary of the total number of index clients and elicited partners for each worker.	• Once an intervention cycle • Quarterly • As needed	• User defined role with permissions for worker report
Report on workers delivering Aggregate Level Interventions **(Monitoring and Evaluation Report)**	Workers	This report provides a summary of aggregate intervention session details delivered by each worker in an agency.	• Once an intervention cycle • Quarterly • As needed	• User defined role with permissions for worker report

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Name of report	Reports sub module	Purpose of Report	Suggested frequency of generating report	Roles with permissions to generate report
Report on workers delivering Client Level Interventions **(Monitoring and Evaluation Report)**	Workers	This report provides a summary of client level intervention session details delivered by each worker in an agency.	• Once an intervention cycle • Quarterly • As needed	• User defined role with permissions for worker report